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Engineering the middle classes: State institutions and the aspirations of citizenship

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Abstract

The 'middle class' has become the subject of euphoric narratives of growth and improving standards of living around the globe, and the object of government interventions and social engineering. Government interventions may be ineffective, have unintended outcomes, or be left barely articulated. Yet the place of the middle classes as embodying national success, stability and modernity has taken on the power of common sense. Modern states have long made middle classes, and in turn been legitimated by them. Indeed, 'state' and 'middle class' are sharply normative concepts – bound up with ideals as much as ideas. They represent interrelated, morally loaded projects of demarcation, distinction and recognition. This special issue examines how state institutions make middle classes through such normative commitments, and how they are made by them in turn.

Keywords

Boundary work, citizenship, middle class, moral projects, state institutions

The 'middle class' has become the subject of euphoric narratives of growth and improving standards of living around the globe. A broad array of definitions has underpinned attention from mainstream media, international financial institutions, and increasingly the social sciences. Whether identified with aspiration, consumption, the market, democracy,

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civil society, or professional expertise, social actors described as middle class are often represented as model citizens and 'agents of transformation'. They are intended to 'lift up' national economies and societies through their aspirations for social betterment, act as mediators between state and citizenry, stand as bearers of publicly recognised morality, and generally contribute to the advance of modern statehood and the free market. As such, the middle class has also become the object of government interventions and social engineering, ranging from the 'national bourgeoisie' found in (post-)socialist countries to the 'honest working people' framed in Western countries as deserving of the full benefits of citizenship. Government interventions may be strikingly ineffective, may have unintended outcomes, or may be left barely articulated. Yet the place of the middle classes as embodying national success, stability and modernity has taken on the power of common sense.

An important perspective on modern states comes from appreciating how they have long made middle classes and, in turn, been legitimated by them. If Marx underemphasised their significance between and beyond the capital–labour binary, this was partly because of changes in European public institutions: 'the unexpected growth of the modern state and with it social groups who are not owners of capital but sell their labour power, while their status clearly distinguished them from both the working classes and the upper classes' (Donner and De Neve, 2011: 5). In many postcolonial settings, expanding government employment drove the growth of a new salaried middle class (see e.g. Southall, 2016). Claims to making such a stratum have also more broadly relied on its capacity to consume, enabled not only by employment but also by public assistance, as in the case of Brazil's *bolsa familia* – although the recategorisation of the poor that results from such efforts is at best fragile (Klein et al., 2018). At the same time, the making of middle classes is central to the *raison d'être* of states cast in a liberal democratic mould. In fact, as we argue here, 'state' and 'middle class' are sharply normative concepts – bound up with ideals as much as ideas. Both concepts are emic and etic. Important analytical terms in the social sciences, they also represent interrelated, morally loaded projects of demarcation, distinction and recognition.

This special issue examines how state institutions make middle classes through such normative commitments, and how, in turn, middle classes make the state. We briefly introduce our approach below, exploring how each appears through the lens of the other. We outline how states and middle classes are intertwined projects of distinction and justification, and how deservingness figures in that relationship.

Projects of the state and the middle classes

The promotion of middle classes reinforces state legitimacy. Middle-class lifestyles and aspirations have had symbolic force as the 'suitably modern' vanguards of development-oriented states (Liechty, 2003), particularly in the global South, and more generally representing a normative ideal of what a society should look like. Portraying policies as made for the middle classes is politically convenient, drawing attention to the middle of society and away from the conflicting class interests of wealthy elites and the working classes or the poor (Heiman et al., 2012).

What such alignment means in practice is far from straightforward. Depictions of middle-class privilege and proximity to officialdom can denote a range of things. Material benefits are distinct from wider influence over policies. Influence may be anchored in the middle-class staffing of state institutions or may result from governments' attempts to placate active voting blocs. That said, state 'capture' in a strong sense is more often associated with elite-led authoritarianism, while middle classes are often politically disengaged as electoral constituencies (Lentz, 2015: 37). Indeed, while popular and scholarly commentary hails middle classes as the core of the democratically committed public (Lahiri, 2014; Lu, 2005; Southall, 2014), critical perspectives bemoan a stratum co-opted by capitalist ideology – too worried about their assets and (perhaps declining) spending power to be able to envisage any broader political horizon (e.g. Weiss, 2019). Even so, given their prominence as the educated, credentialled and officially recognised and employed, it is hardly surprising that members of middle classes are able to frame assertions of their own distinction and habitus in the form of general moral narratives about state and nation (Anderson, 2018; Muir, 2015).

But the relationship between states and middle classes is more fraught than this implies. Middle classes are defined by relative economic and status privilege in comparison to those deemed poor or working class. Yet occupational earnings produce far less security or long-term accumulation than capital assets (Piketty, 2014). Sisyphean middle-class efforts to convert income into enduring wealth can produce a stratum encumbered by debt (James, 2014), and easily squeezed by taxes and cuts to entitlements (see Sheild Johansson, 2022, Mikuš, 2022, both in this issue). Expectations of entitlement often sit uncomfortably alongside experiences of considerable precariousness, sharpened by contracting public services and employment.

Moreover, while they do have privileged relationships to state institutions, middle classes routinely insist on their distance. That, in turn, depends on a spectrum of forms of livelihood: from salaried public service, to the professions that require state accreditation and recognition, to entrepreneurs in the market and explicitly independent from the state. Striking across this spectrum is that the state is nevertheless accorded a protagonist's role in self-defining stories. A key distinguishing feature of middle classes, Liechty (2003: 17) notes, has been 'moral distance' from the 'vulgarities' of work and wealth – an emphasis on status through 'accomplishments and refinement'. Relationships with state institutions do often depend on modes of employment, but as the basis for morally charged self-understandings. The latter are often further inflected by a concern to remain in the state's good graces. Classness, beyond socio-economic status and habitus, is intertwined with the performance of being a 'good citizen', and the upholding of the 'correct' values of the polity and its economy.

That moralism is key to a crucial aspect of this fraught relationship. States and middle classes are ongoing *projects* of demarcation and legitimation – necessarily incomplete but invested in accepted boundaries. Each relies on the other's apparent solidity, a form of complicity as their established images are belied by the messy and sometimes precarious practices that sustain them (Bolt, 2021). Seminal interventions have cast both as ultimately illusory: a state idea demanding popular commitment, yet masking a fragmentary institutional infrastructure (Abrams, 1988); a middle-class dream of advancement whose

hopes and attendant anxieties lead people to conspire in their own exploitation (Weiss, 2019). Both are notably preoccupied with membership and its conferral of status.

Scholars have framed these processes through rubrics of boundary work, albeit curiously in parallel but separate conversations (see Bolt, 2022, this issue). For people concerned to be included in the middle class, stories of improvement shape performances of distinction (Liechty, 2003), while also leaving little dignity for those 'falling from grace' through downward mobility (Newman, 1988). Attempts to assert distinction vis-à-vis others considered less deserving may produce boundary work in a political mode, through support of exclusionary and illiberal movements and policies (Fernandes and Heller, 2006). Performing credentials, cultural fluency and taste (see Bourdieu, 1984) is especially important for a stratum whose economic circumstances may be fragile or hard to transmit across generations. Lentz (2020) frames such distinction and boundary work as 'doing being middle class'. Meanwhile, among state officials, discourses about public institutions are prescriptions that set scripts and roles, boundaries and the terms of membership. It is partly by means of such normative judgements that state ideas sustain the authority and permanence of the state's various parts (Thelen et al., 2014).

These forms of boundary work are mutually constitutive. A familiar marker of middle-class distinction is fluency in 'state thinking' – that is, the very habituation to bureaucratic concepts and categories that undergirds the state's imaginative resilience and its taken-for-grantedness (Bourdieu, 2014). This in turn contributes to the impression of coherent state institutions in the first place – what Mitchell (1991) called 'state effects'. 'Practices that make such structures appear to exist' (1991: 94) are the coordinated efforts that together produce apparently durable and impersonal institutions: students, teachers, and other personnel on courses of study make what appear to be transcendent educational establishments; countless professional careers, added together, comprise apparently abstract organisations of public service and government. Moral narratives lie at the heart of these practices and processes of institutionalisation.

The deserving middle classes and the deserving state

In this collection of articles, we chart how the state makes and promotes middle classes, and how the middle classes understand and make the state through their relationship to it. This, we hold, is a relationship that is fundamentally characterised by the notion of *deservingness*, in its different, context-specific shades and variations. As already suggested, the middle classes are those most habituated to state thinking, in whom the cultivation of consent has been most readily naturalised, and who are likely to recognise themselves and their individual aspirations in the grand design of national projects. They are routinely depicted as the backbone of society, its morality and its progress, scripted as deserving the state's attentions and benefits, and seeing society's problems as 'our problems'.

These are the people who are reassured not scared by the police (Graeber, 2014: 76), who generally have reasons to trust and are at ease with the judicial system (Fassin, 2018), and who do not dread the control of a punitive welfare apparatus (Koch, 2015). Quite the contrary, being in the 'middle' of society means that the system normally 'works' for

them, delivering on its promises and functioning mostly as it was designed to. And this remains a powerful fiction, even if, across the globe, we can observe how, despite the ideological centrality of this middle stratum to state designs, the overweening dominance of capital and rising costs of living have in practice eroded the actual benefits that the system can and does deliver to its deserving citizens (Therborn, 2020). Similarly, neoliberalising tendencies have in effect, in many places, shifted the terms of the state–citizen relation to one of provider–consumer (Anand, 2012) or facilitator–entrepreneur (Vicol, 2020). This 'squeezed middle' is then often described as the driving force of resurgent populism and nationalism, across the global North (Kalb, 2019; Koch et al., 2021) and increasingly also in the global South (for example in India and Brazil). Moreover, there is often a racial dimension to this aspect of class stratification, based on selective inclusion and exclusion, which remains underplayed or unacknowledged in official state policy, as in these cited examples (see also Bhambra, 2017; Krishna, 2015), and that presents a more complicated picture in some of the cases in this special issue, like in Bolivia, Mozambique and South Africa (Bolt, 2022; Schubert, 2022; Sheild Johansson, 2022 – all in this issue). Nonetheless, the idea of being the deserving middle remains largely unchallenged, with the ideology of meritocracy and social advancement through thrift and decent work conveniently obscuring the inherited class, racial or other privileges that historically did and often still do make the system work for the middle classes.

This sentiment of entitlement, however, as we shall see in some of the contributions, sometimes emerges in contradistinction to a state (or its rapacious elites) that is seen to have lost its way. Deservingness goes both ways: middle classes are concerned with their status and rightful place in society, but the state has to uphold its side of the bargain. This is evident, for example, in discussions about reciprocity in a special issue on taxation and citizenship (Makovicky and Smith, 2020), in which claims for a 'rightful return' express 'a demand for a well-functioning state that is able to "deliver" and that provides its citizens with adequate infrastructure to live what many call "decent lives"' (Kauppinen, 2020: 40). That is, regardless of how close (as state functionaries) or distant (as independent entrepreneurs) to the state these middle classes see themselves, a preoccupation with the state and their own relation to it remains a common central concern. As such, the boundary work of sociological theory (Lamont, 1992) is performed in relation not only to 'elites' and 'lower classes', as outlined above, but crucially also in relation to the state itself – a relationship that is contested and permanently renegotiated in daily discourse and practice. Thus, where other anthropologists have explored the view from 'the margins of the state' (Das and Poole, 2004), our emphasis illuminates more central state institutions, their imaginaries, and their roles in people's lives.

Training our ethnographic lens on precisely these constant renegotiations of proximity and distance allows us to reframe the methodological problem of what exactly is the object of observation. As much as the anthropology of the state has made clear that 'the state' is a fiction, a social artefact, a 'state effect', it is no less real because of that (Aretxaga, 2000: 53). It materialises, in the lives of people, precisely in and through these negotiations – and, as we emphasise, it takes shape through evaluative judgement. Similarly, while 'the middle class' often remains vexingly nebulous, or reduced to its socio-economic status, 'doing being middle class' can often be traced back to very

specific, mundane interactions with state institutions, through which rights, entitlements, status, and aspirations are renegotiated.

As we argue, it is among those individuals and groups who articulate a specific claim on their place in society *through* their special relationship to the state – a claim predicated on the idea of deservingness – that the contours of the (plural, not unitary) middle classes emerge, beyond the purely economistic or the fuzzily self-ascribed. And these negotiations are carried out in arenas (Hagmann and Péclard, 2010) that are relevant to both sides, central both to modern statecraft and seemingly independent projects of self-making: taxation; property ownership and markets; social reproduction in the home; state employment; professional education, expertise and accreditation; even the law itself. Such arenas are our ethnographic focus in this collection.

Engineering the middle classes

This special issue thus explores the connections between bureaucratic infrastructures, the very idea of the state, and middle-class lives, complicating sharp dichotomies between state procedures and imaginaries and apparently independent self-making. Rather than focusing on 'the middle class' and their aspirations as such, contributors investigate the role of state institutions, processes and projects in mediating these aspirations. Middle-class identities often depend on such institutions, even as market-friendly government policies may reinforce or undermine the bases of middle-class stability.

Claims to institutions – those of education, marriage, or inheritance, for example – are grounded in citizen expectations, consent to being governed (however that is defined in particular settings) and struggles over who is 'deserving' of recognition and resources. But equally central to the idea of the contract and the state is the place of middle-class aspirations – professionalism, accumulation, wealth management, the 'proper' family – in affirming both status quo and trajectories of national development. And although these institutions were often expressly designed to engineer the creation and expansion of a stable middle class, the research presented here highlights the bricolaged, iterative, and reciprocal nature of this relationship, through which the state and the middle classes appear as contingent and always emerging, mutually constitutive projects.

Such imbrication is demonstrated especially starkly by home-based roles and home-making, precisely because they appear to be shaped by private decisions, intimate relationships and non-state values. Geoffrey Hughes (2022, this issue) analyses the institutional mediation of the middle-class housewife in Jordan throughout the 20th century. Today, international commentators and Jordanians bemoan strikingly low rates of female labour market participation – reflecting globalised norms and, for middle-class Jordanians, the attraction of a second income in a marriage. The stay-at-home housewife, depicted as 'traditional', now appears a retrograde figure. But Hughes' article rejects 'salvage ethnography', which would depict as culturally essential what is threatened by social-economic transformation. The middle-class housewife (*rabbat bayt*) requires understanding historically – an artefact of official Ottoman, British and Jordanian imaginaries of modernity. Accelerating in the wake of Jordanian independence, the figure was institutionalised through knowledge practices, such as in Sharia courts' marriage

contracts. It was cemented in state-driven transformations in property relations, and further deepened and spatialised in suburbs through policy models of home-ownership and housing provision. Hughes's archival sources themselves – marriage contract, property title, policy document – reflect the bureaucratic state's centrality in the middle class.

If the housewife in the private home appears counterposed to the state, so too does the commercial trader in the market. Yet Miranda Sheild Johansson (2022, this issue) examines state attempts to remake an indigenous trading middle class in Bolivia through the figure of the taxpayer. These involve educational initiatives and incentive-creating policies, as well as a rebranding of the relevant state institution itself as appropriately transparent and 'modern'. Like the figure of the housewife in Jordan, the taxpayer in Bolivia requires understanding in light of discourses circulating well beyond the country. Historically European-derived notions of the middle class as a taxpaying 'backbone of society' loom large, as do still broader associations of increased taxation with good governance and development. In the last two decades, the government of Evo Morales attempted to square these normative ideas with the values of the indigenous population it represented. But, while the taxpayer may stand for one notion of the public good, it founders on an individualised connection to the state, incompatible with indigenous ethics of kin-based circulation and ritually ensured fertility.

State officials' own experiences entwine middle-class aspiration and self-understanding with state institutions and imaginaries. This is thrown into relief when personnel outlive changes in governing ideologies. Jon Schubert (2022, this issue) explores the attachment to ideals of professionalism among public administrators in Mozambique's hydrocarbons sector. An older generation was trained in the socialist East Bloc (and educated even earlier in the Portuguese colonial era); a younger one is aligned to neoliberal government in a manner reflecting Mozambican socialism's decline. For both, professionalism marks them off from an elite living off Frelimo party patronage, and from the country's poorer majority; it places them 'in the middle'. Professionalism is not only the basis of morally loaded and class-inflected boundary work vis-à-vis other Mozambicans. It also positions public servants at a critical distance from the state they serve, albeit with different underlying rationales. Socialist-era administrators' distance comes from attachment to a previous era with a sharply different ethos of responsibility through the party-state. The diffidence of their younger colleagues, by contrast, comes with their market-oriented, 'business-friendly' habitus.

State officials equally illuminate the intersection of middle-classness, institutions and imaginaries when new regimes herald new personnel, who however then stand uncomfortably for enduring legacies. In his contribution, Maxim Bolt (2022, this issue) looks at legal-administrative professionals at the Johannesburg Master's Office, the bureaucratic institution responsible for deceased estates (inheritance). As new, mostly black holders of formerly white positions, they stand both for the possibilities of post-apartheid justice and the realities of an alienating and dated system. They are both highly educated, legally qualified exemplars of middle-class success and, at the same time, civil servants in an underfunded public institution with limited power in practice. This places them awkwardly vis-à-vis legal professionals in the private sector – those who used their

training to become lawyers. It also produces uncomfortable expectations among the public, especially the more recently enfranchised black population that expects understanding and solidarity from the Master's functionaries. Officials' legal-bureaucratic standing and their professional middle-class status are deeply intertwined. Situational performances of legal professionalism, navigating different audiences through shifting professional personae, demonstrate the ambivalence and fragility that characterise both. Even so, their daily engagement with the law also reveals a sense of ownership of a transformed state project.

A final pair of articles profiles home-ownership and the state. In his exploration of the Croatian mortgage boom, Marek Mikuš (2022, this issue) analyses how, after the transition from socialism and the end of the war, the boom was both naturalised through hegemonic public narratives about household debt expansion and culturalised by evoking cultural, affective, use and financial values of home-ownership. By charting the transformation of home-ownership through the individual stories of his interlocutors, Mikuš highlights how schemes to broaden access to housing credit have, through financialisation, increased the pressures bearing on the urban middle classes. This material demonstrates the role of overlapping classification practices of financial and state institutions in class formation. The analysis reveals a distinct post-socialist trajectory where financialisation neither provokes the decline of an old middle class nor fuels the rise of a new one but rather reshapes the existing middle class by wedding it to mortgaged home-ownership with distinct implications for middle-class subjectivities and politics, and, ultimately, their relationship to the state.

Henrike Donner (2022, this issue) offers a complementary interrogation of home-ownership in Kolkata, India. This highlights the kinship arrangements and gendered dependencies surrounding state policies and related middle-class subjectivities. Since the 1990s, policy emphasis has explicitly been on expanding women's access to real estate in their own names, such as through beneficial loan conditions and targeted housing schemes. Informing it is an ideology of economic autonomy and propertied citizenship, which resonates with professional aspirations and individuated consumption. However, Donner argues, it is imperative to understand how home-ownership and home-making interact. Middle-class women largely become home-owners as daughters and wives through the expectation of care work. With a trend towards smaller families, parents invest in their only daughters through education and real estate. Yet this does not translate into long-term employment, which in a liberal feminist view might be the source of propertied citizenship. Gendered interdependence is built into the very schemes that follow from state policies, as mortgage terms and property developments discriminate against unmarried women.

Taken together, the contributions to this special issue show how the complex relationships between middle class and state emerge through concrete processes, against the horizons of particular policies and models. How do state institutions and processes contribute to middle-class formation, whether by making families through government employment and marriage in Jordan, making a post-apartheid property system and a new generation of professionals in South Africa, promoting home-ownership and home-making in India, or recasting the value of working citizens through taxation in Bolivia?

How do states both deliver on the promise of social betterment and reproduce entrenched inequalities, from technocratic imaginaries and professional expertise in Mozambique, to models of mortgage debt in Croatia? What kinds of imaginaries and aspirations of middle-class lives and livelihoods are promoted by these policies? How do the successes and failures of such processes redefine the relationship between 'state' and 'citizens' – the social contract? How are ideas and ideals of the state and state legitimacy played out and renegotiated in the interaction of state bureaucrats, policies, and citizens? And what are the effects of such institutions and processes on middle-class lives more broadly?

This collection responds to an anthropological need to reconsider 'universal' and 'particular' phenomena. Aspirations entangle with institutionalised life-courses, from schooling and qualification, to employment, to marriage, to home-ownership, to a good death and the passing on of wealth. Even as we reject universalist and heteronormative social-science assumptions about societal change and a natural 'life cycle', how might shared registers, imaginaries and processes of state- and class-making undergird the blueprints and schemes involved in middle-class formation? Our emphasis on state projects in building middle classes affords fresh terrain for comparative anthropology.

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